

Individual Tax Checklist

In office meeting
 online (Client portal)

Below is a list of information based on your last year's tax return which we require in order to prepare your income tax return. *Please disregard any items which are not applicable to your circumstances.*

Year ended: 30th June 2020

PERSONAL DETAILS	Please advise of any changes to your personal details
Name:	
Address:	
Phone:	
Email:	
Occupation:	
Spouse:	
Children:	

INCOME	YES	NO	N/A
Please note: Pre-fill information comes from: <ul style="list-style-type: none"> employers (JobKeeper payments are included in your income statement and will be pre-filled in your tax return) organisations such as banks, health funds and government agencies (Centrelink - JobSeeker) records you have uploaded on the ATO app's myDeductions tool your previous tax returns and current tax account status. 			
Payment Summaries: <ul style="list-style-type: none"> Copies of all annual PAYG payment summaries 			
Other income: <ul style="list-style-type: none"> Details of any other income, including business income during the year 			

DEDUCTIONS	YES	NO	N/A
Motor vehicle expenses - <ul style="list-style-type: none"> Logbook business percentage _____% Details of all expenses incurred including:- <ul style="list-style-type: none"> Fuel Registration and insurance Interest on finance, or if new car, copy of finance agreement or loan statements Repairs and servicing 			

Other work related deductions			
• Work related travel			
• Union fees and subscriptions			
• Training courses, seminars or self-education			
• Business use of mobile, home phone or internet: costs and business percentage			
• Uniform, protective clothing, laundry and dry cleaning			
• Home office expenses - including estimate of number of hours worked at home _____			
• Working from home during COVID-19 Electricity Bill Phone Bill Internet Bill Any receipts relating to working from home (consumables and stationery)			
Other deductions			
• Any other details relating to tax deductible expenses incurred during the year			
OTHER	YES	NO	N/A
• We have below mentioned Bank account details of your nominated bank account at present for refund purpose. Please correct the same if required BSB: ACCT NAME: Financial Institution Name:			

Please return prior to your appointment to enquiries@bmwca.com.au along with your receipts.